

ITSM4Office

Server Component -Integration Guide v1.3.0.7



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Integration Summary

The ITSM4Office integration enables you to create, manage and follow-up your tickets from a client-based panel interface interacting with Outlook.

- *Create an Incident semi-automatically recompiling data from the email (contact, summary, Notes, date, and time of the request)*
- *Manage and follow-up of your ITSM workload (assign, dispatch, add work info)*
- *Intuitive Search (Ticket number, keywords, dates, priority....)*
- *Drag and drop of attachment into the ticket be added as a work info*

⚠ Before doing any operation on the Remedy platform it is highly recommended to perform a Database Backup to perform a roll back if needed.

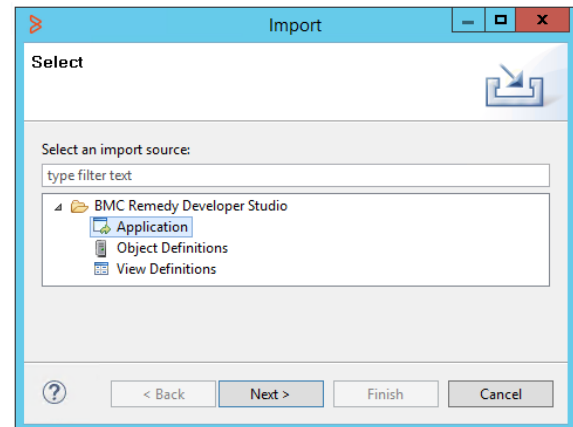
BMC Remedy AR System

i The following deployment should be done using the **BMC Remedy Developer Studio**.

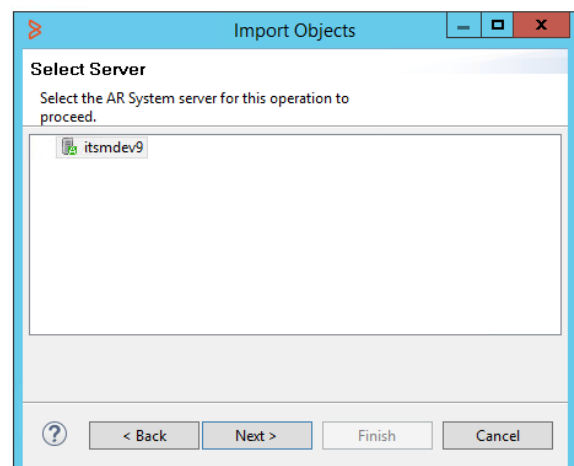
1. Import of the Server Component Remedy Application

From the main menu, select **File > Import** and expand **BMC Remedy Developer Studio**.

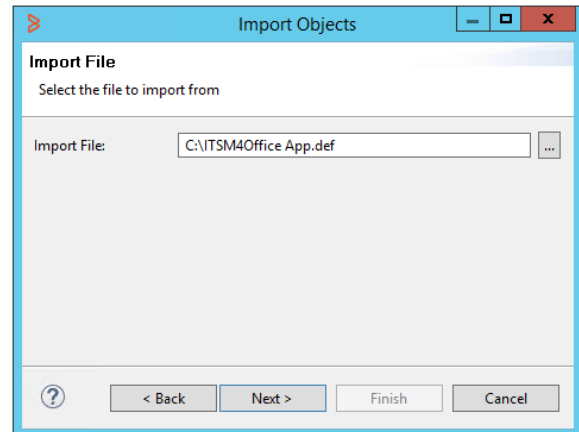
Select **Application** and click **Next**



Select **Server Name** and click **Next**.



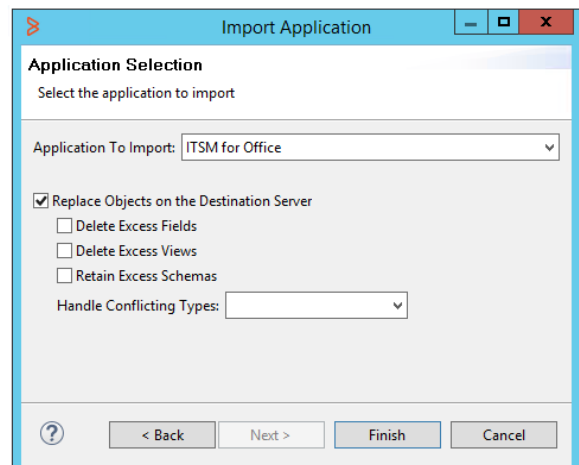
Select the proper Application Definition file **ITSM4Office App vX.def** from the appropriate location and click **Next**.



 **Note**

- For AR v **8.x** import the **ITSM4Office App for v8.x.def** file
- For AR v **9.0.x** import the **ITSM4Office App for v9.0.x.def** file
- For AR v **9.1.x** import the **ITSM4Office App for v9.1.x.def** file

Make sure to select **Replace objects on the Destination Server** and click **Finish**.



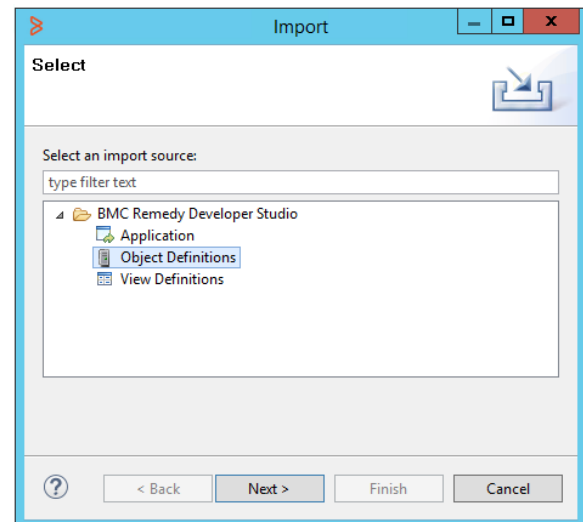
Known Errors

[v9.0.x] **ERROR (168) / ERROR (412)** after importing ITSM4Office App for v9.0.x.def

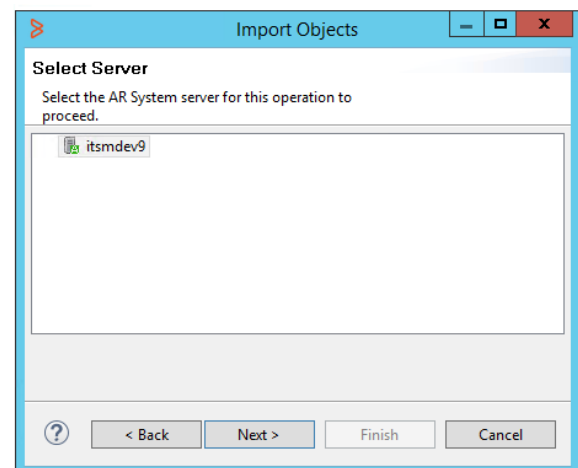
2. Import the Other Object Definitions

From the main menu, select **File > Import** and expand BMC Remedy Developer Studio.

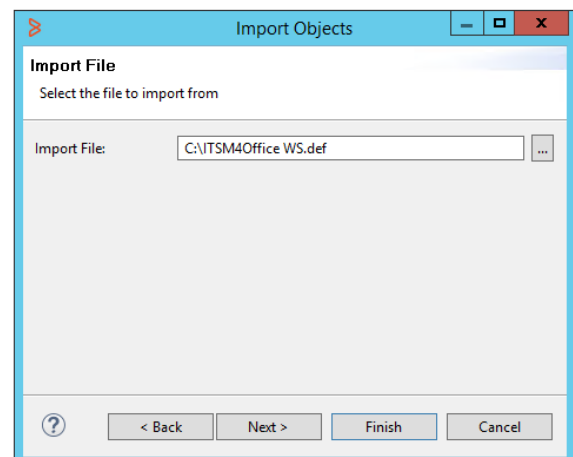
Select **Object Definitions** and click **Next**



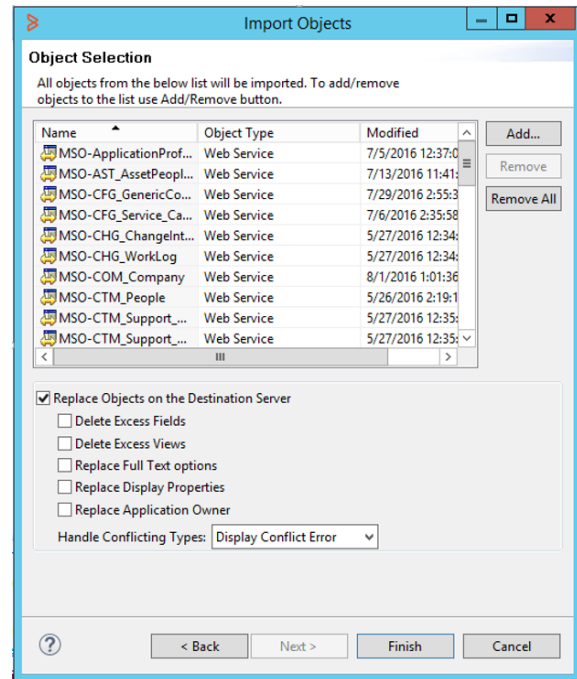
Select **Server Name** and click **Next**.



Select file **ITSM4Office WS.def** from the appropriate location and click **Next**.



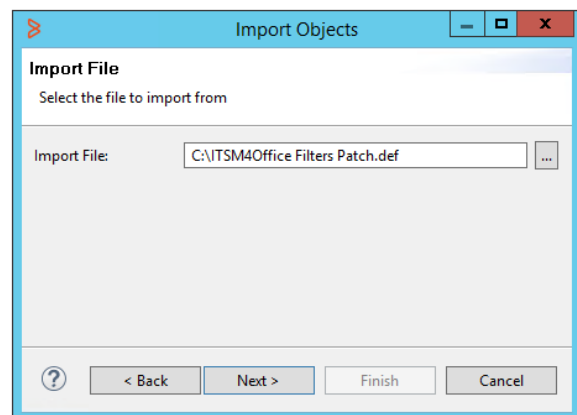
Make sure to select **Replace objects** on the Destination Server and click **Finish**.



Note

- For AR v**9.1.x** import the incremental **ITSM4Office WS v9.1.x.def** definition file in addition to the Base WS Definition.

Follow the same steps to import the Object Definition file **ITSM4Office Filters Patch.def**

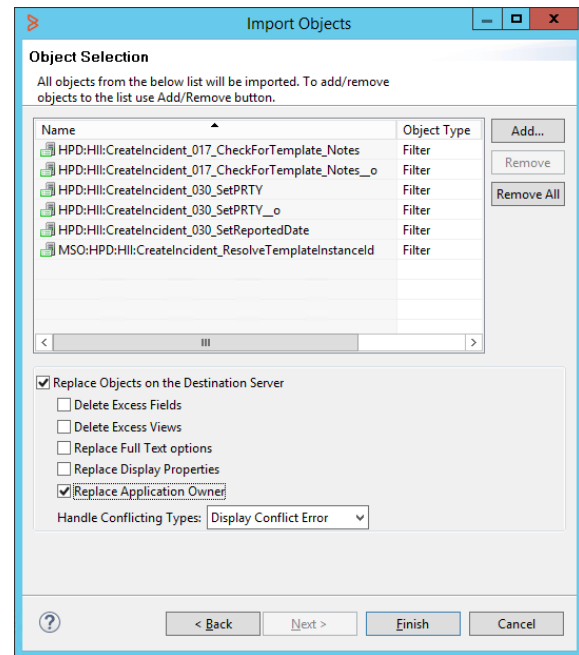


Description of these filters:

CheckForTemplate_Notes_o : Correct a bug with the notes field in the create Incident interface

SetPRTY_o and SetReportedDate : Allow to Set the reported date according to the received time of the email

ResolveTemplatelInstanceID : Resolve template ID to template instance ID



Note

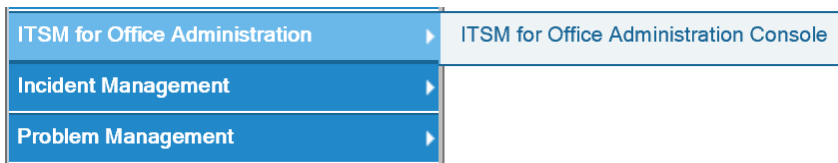
In case of updating the Server Component it is recommended at this stage to **Flush the MidTier Cache** as well as the local Browser cache to properly take new definitions into account.

3. Building the ITSM4Office Overview Console

Required Permission

Administrator role is needed to access this form

In the Applications menu, a new **ITSM for Office Administration** menu will appear, go to the Console.



Preparation of the MSO Overview Console View (Step 1)

Do not (re)build the view using the OOTB "SHR:Union_ConfigurationConsole". Although the Union process use the same supporting forms for fields & mappings, the view build service will use custom workflows.

From the **Install & Setup** menu, click the **"Rebuild Union Overview"** button.

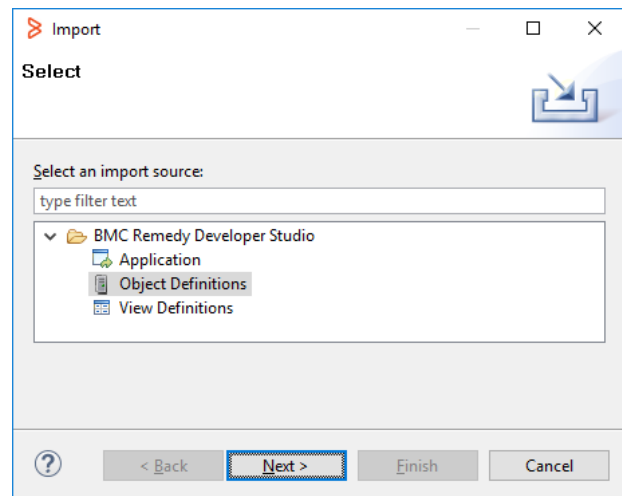
Note

This action will trigger a (re)build of the **MSO_OverviewConsole** View **bypassing the Enum** Value conversion. Use this step to rebuild the view if you add custom field mappings & before adding them to the **MSO:Union_OverviewConsole** Form Overlay.

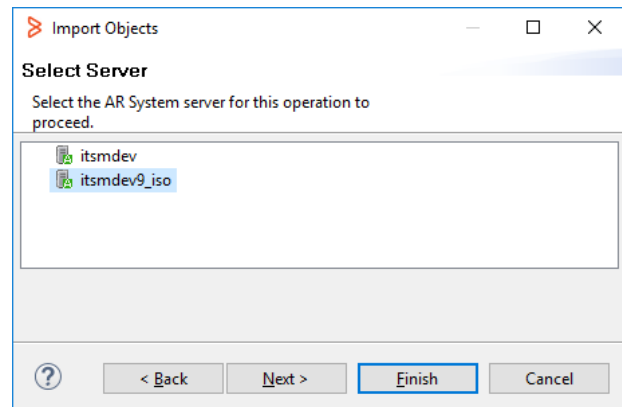
Import of the MSO:Union_OverviewConsole definition (Step 2)

From the main menu, select **File > Import** and expand **BMC Remedy Developer Studio**.

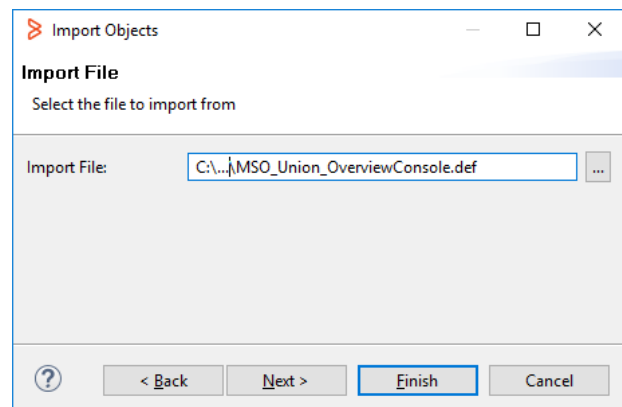
Select **Object Definitions** and click **Next**



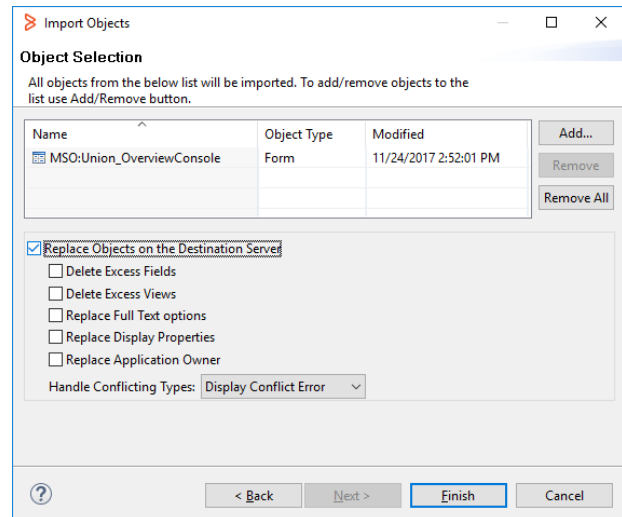
Select **Server Name** and click **Next**.



From the appropriate location, select **MSO_Union_OverviewConsole.def** file and click **Next**.

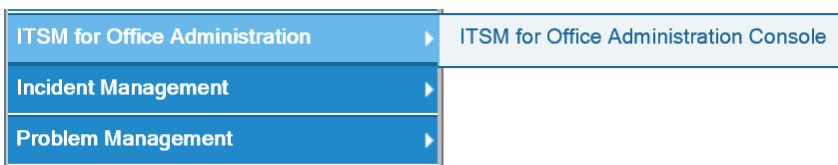


Especially in case of a server component update, make sure to check **Replace objects on the Destination Server** and then click **Finish**.



Post install & re-configuration (Step 3)

In the Applications menu, go back to the **ITSM for Office Administration console**.



From the **Install & Setup** menu, click the **“Post Install Init”** button. It will trigger workflows that will perform a version specific initialization of the application.



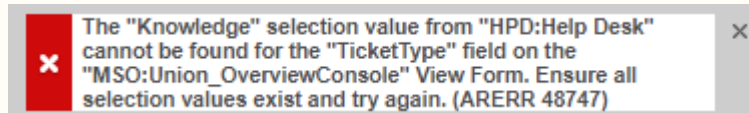
 More information about the Overview Console Customization can be found on BMC Docs:
<https://docs.bmc.com/docs/display/public/itsm81/Extending+the+Overview+console>

The customization process remains the same and only the view build service differs. Just remember to (re)build the View using the **Install and Setup** Menu.

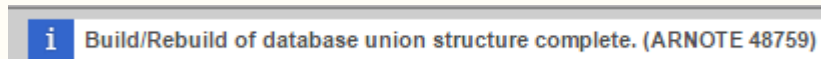
 **Note (ARERR 48747)**

During the Post Install, a **second pass rebuild** of the **MSO_OverviewConsole** View will be done, this time triggering an **Enum Value Conversion**.

Enum Value Conversion can sometime give error if custom enum fields were added. Enum Values will need to be updated accordingly in the **MSO:Union_OverviewConsole** form overlay to match the source form values.

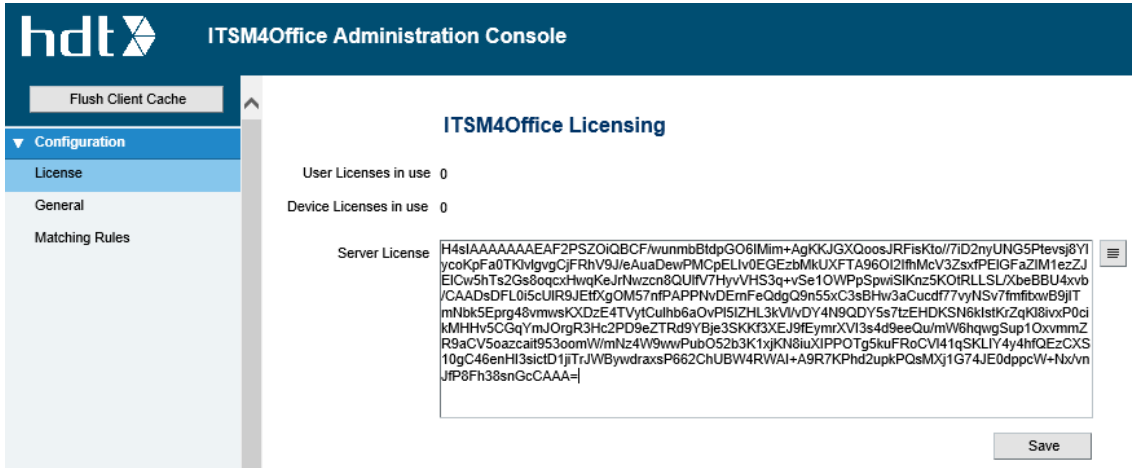


It is recommended to avoid enum fields and to use regular character fields instead (Field Type 4).



4. Server License configuration

In the **License** Tab, copy the license that was provided into the **Server License** field then **Save**.



The screenshot shows the ITSM4Office Administration Console interface. On the left, there is a navigation menu with 'Configuration' expanded, and 'License' selected. The main area is titled 'ITSM4Office Licensing' and displays 'User Licenses in use 0' and 'Device Licenses in use 0'. Below this, the 'Server License' field is populated with a long alphanumeric string. A 'Save' button is located at the bottom right of the form.

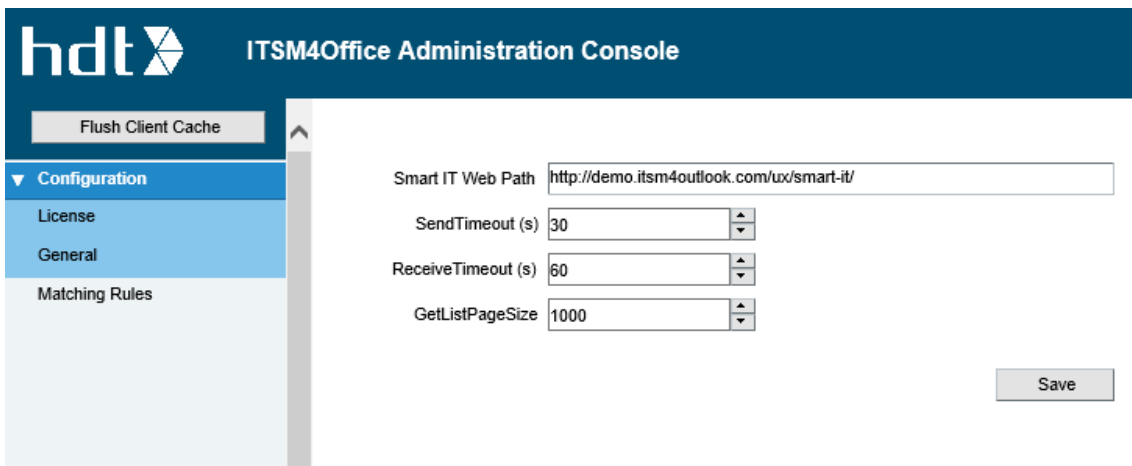
```

H4slIAAAAAAEAF2PSZOiQBCFvunmbBtdpG06IMim+AgKKJGXQoosJRFisKto//7ID2nyUNG5Ptevsj8YI
jcoKpFa0TKvlgvgCjFRhV9JfeAuaDewPMcpELiv0EGEzbMkUXFTA960I2fthMcV3ZsxfPEIGFaZIM1ezZJ
EiCw5hTs2G88qqcxHwqKeJrHwzcn8QUIV7HyvVHS3q+vSe1OWPpSpwiSlKnz5KOIRLLSLX/beBBU4xvb
/CAADsDFL0iScUIR9JEfXgOM57nfPAPPNvDEmFeQdgQ9n55xC3sBHw3aCucdf77yNSv7mfiftwB9jIT
mNbk5Eprg48vmwsKXDzE4TVytCulhb6aOvPISIZHL3kVlvDY4N9QDY5s7LzEHDKSN6kStKzqK8ixvP0ci
kMHhy5CGqYmJOrgR3Hc2PD9eZTRd9YBje3SKKf3XEJ8fEymrXVl3s4d9eeQu/mlW6hqwqSup1OxymmZ
R9aCV5oazcaif953oomW/mNz4W9wvPubO52b3K1xjKN8iuXlPPOTg5kuFRoCV41qSKLIY4y4hfQEzCXS
10gC46enHI3sictD1jITrJWBwydraxsP662ChUBW4RWAI+A9R7KPhd2upkQsMXj1G74JE0dppcW+Nx/vn
JfP8Fh38snGcCAAA=

```

Smart IT configuration (Optional)

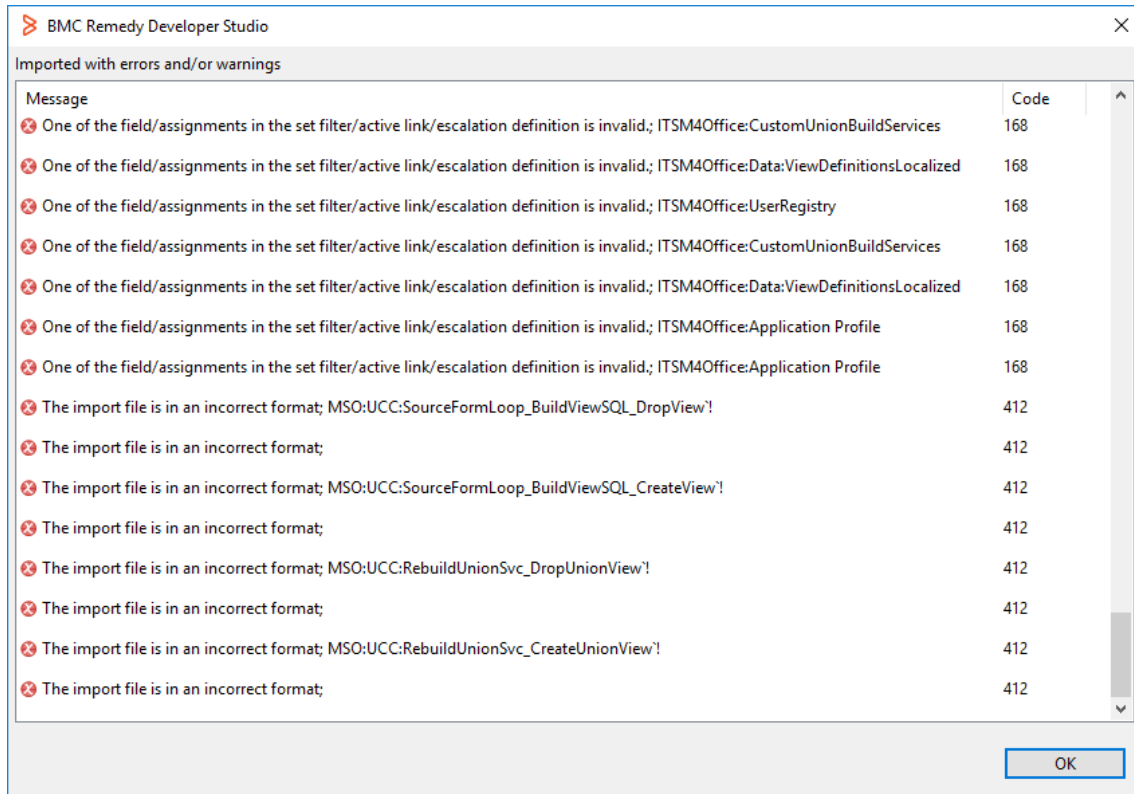
If you are using Smart IT, you can configure the URL in the **Smart IT web path** field under **General**, then **Save** the configuration.



The screenshot shows the ITSM4Office Administration Console interface. On the left, there is a navigation menu with 'Configuration' expanded, and 'General' selected. The main area is titled 'ITSM4Office Licensing' and displays 'Smart IT Web Path' with a text input field containing 'http://demo.itsm4outlook.com/ux/smart-it/'. Below this, there are three dropdown menus for 'SendTimeout (s)' (30), 'ReceiveTimeout (s)' (60), and 'GetListPageSize' (1000). A 'Save' button is located at the bottom right of the form.

Known Errors

[v9.0.x] ERROR (168) / ERROR (412) after importing ITSM4Office App for v9.0.x.def



Though the ERROR (168) could be ignored, ERROR (412) will result in the following missing filters.

- MSO:UCC:SourceFormLoop_BuildViewSQL_DropView`!
- MSO:UCC:SourceFormLoop_BuildViewSQL_CreateView`!
- MSO:UCC:RebuildUnionSvc_DropUnionView`!
- MSO:UCC:RebuildUnionSvc_CreateUnionView`!

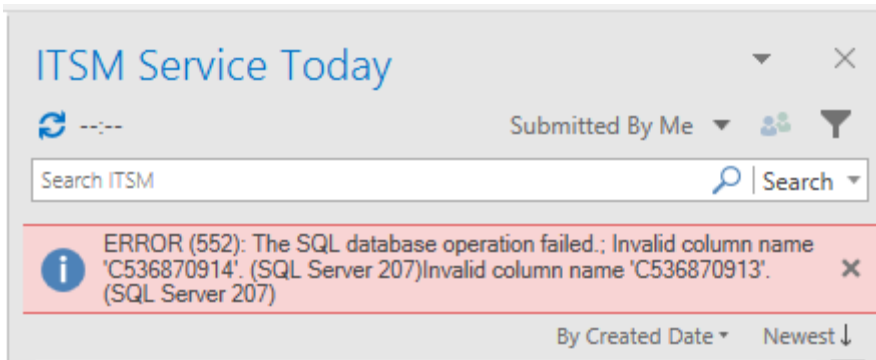


Solution

Import as 'Object Definitions' the "**CustomUnionBuildServices.def**".

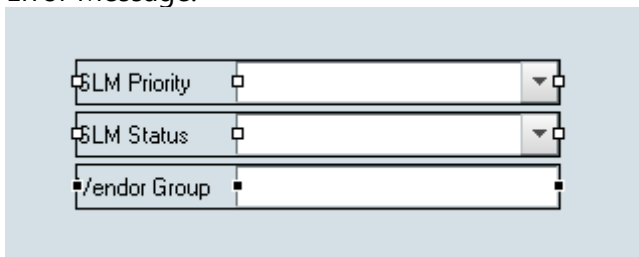
ERROR (552) with the MSO:Union_OverviewConsole

! ERROR (552): The SQL database operation failed.; Invalid column name 'C536870914'. (SQL Server 207) Invalid column name 'C536870913'. (SQL Server 207)

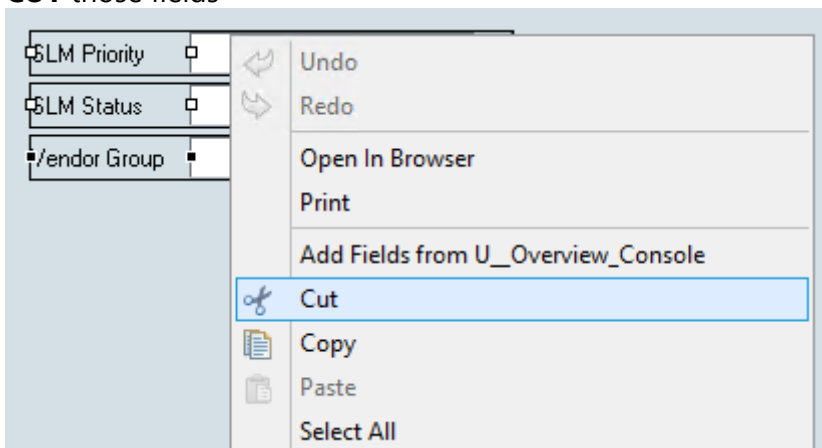


It might happen that the Union **Overview Console customization** fails with this error, especially in case of update when using Overlays. A simple workaround is to proceed as follow:

1. From Developer studio, open the "**MSO:Union_OverviewConsole**" in best Practice Mode.
2. **Locate** and **select** the problematic Custom Fields using the Columns IDs of the Error Message.



3. **CUT** those fields



4. **Save** the form Overlay

5. **PASTE** back the Fields



6. **RE-SAVE** the Form Overlay

Error should be gone and fields properly linked to the View.

Central Configuration Management

1. ITSM Server Configuration using Domain GPO

To provide a more seamless integration in a Windows domain environment the ITSM Server configuration can be push to the clients using GPO pushed registry entries. You will find bellow a simple configuration example.

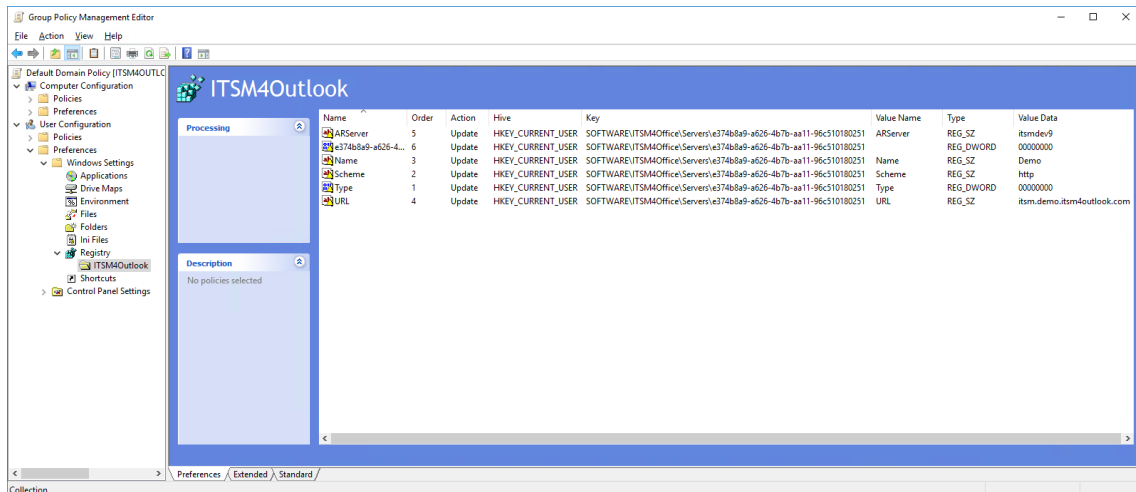
i You can add as many servers as needed in the global configurations. Just make sure to provide each Server Item with a different **global unique identifier**. GUID can be easily generated using an online GUID generator for example.

Description	Action	Hive	Key	Value Name	Type	Value Data Example
AR Server Name	Update	HKEY_CURRENT_USER	SOFTWARE\ITSM4Office\Servers\<GUID>	ARServer	REG_SZ	itsmdev9
Item Order	Update	HKEY_CURRENT_USER	SOFTWARE\ITSM4Office\Servers\<GUID>	(default)	REG_DWORD	0
Friendly Name	Update	HKEY_CURRENT_USER	SOFTWARE\ITSM4Office\Servers\<GUID>	Name	REG_SZ	ITSM Prod
Scheme	Update	HKEY_CURRENT_USER	SOFTWARE\ITSM4Office\Servers\<GUID>	Scheme	REG_SZ	https
Server Type	Update	HKEY_CURRENT_USER	SOFTWARE\ITSM4Office\Servers\<GUID>	Type	REG_DWORD	0
URL	Update	HKEY_CURRENT_USER	SOFTWARE\ITSM4Office\Servers\<GUID>	URL	REG_SZ	itsm.demo.itsm4outlook.com
Authentication	Update	HKEY_CURRENT_USER	SOFTWARE\ITSM4Office\Servers\<GUID>	Authentication	REG_DWORD	1
User ID Format	Update	HKEY_CURRENT_USER	SOFTWARE\ITSM4Office\Servers\<GUID>	Login	REG_DWORD	0
User ID Transformation	Update	HKEY_CURRENT_USER	SOFTWARE\ITSM4Office\Servers\<GUID>	UserIDTransformation	REG_DWORD	5

Authentication Types	
0	Unknown
1	Password
2	RSSO

Login Format Types	
0	Default
1	sAMAccountName
2	userPrincipalName
3	Domain\Username
4	mail

UserID Transformations	
0	None
1	RemoveBMCDomain
2	RemoveDomain
3	RemoveEmailDomain
4	ToLowerCase
5	ToUpperCase



Server Component Removal

⚠ **Before doing any operation on the Remedy platform it is highly recommended to perform a Database Backup to perform a roll back if needed.**

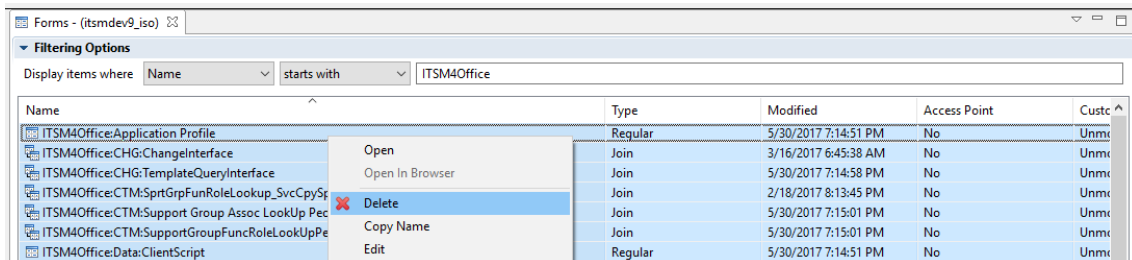
1. Remedy Objects Clean-up

⚠ Note

The "ITSM for Office" Remedy Application might link to Out of the Box Component like menus for example. **DO NOT BULK REMOVE OBJECT DIRECTLY FROM THE APPLICATION** as you could remove critical OOTB components.

From the BMC Developer studio > **All Objects > Forms**

- Search for all object **starting with "ITSM4Office" & "MSO"**
- Select them all and Delete them.

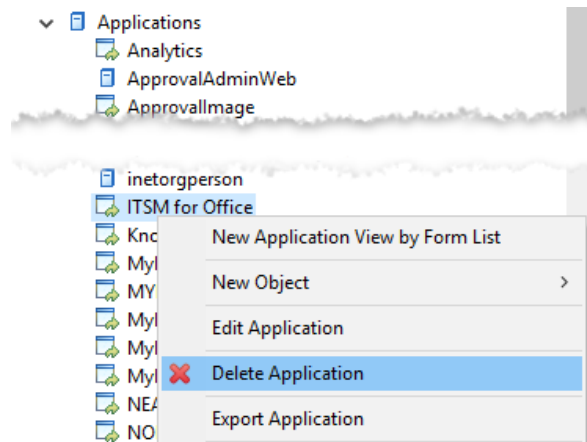


Name	Type	Modified	Access Point	Custc
ITSM4Office:Application Profile	Regular	5/30/2017 7:14:51 PM	No	Unm
ITSM4Office:CHG:ChangeInterface	Join	3/16/2017 6:45:38 AM	No	Unm
ITSM4Office:CHG:TemplateQueryInterface	Join	5/30/2017 7:14:58 PM	No	Unm
ITSM4Office:CTM:SprtGrpFuncRoleLookup_SvcCpyS	Join	2/18/2017 8:13:45 PM	No	Unm
ITSM4Office:CTM:Support Group Assoc. LookUp Pec	Join	5/30/2017 7:15:01 PM	No	Unm
ITSM4Office:CTM:SupportGroupFuncRoleLookUpPe	Join	5/30/2017 7:15:01 PM	No	Unm
ITSM4Office:Data:ClientScript	Regular	5/30/2017 7:14:51 PM	No	Unm

Repeat the operation for the other objects:

- Active Links
- Filters
- Escalations
- Active Link Guides
- Filter Guides
- Web Services
- Menus

Once all the relevant objects are removed you can delete the **“ITSM for Office”** Remedy Application:



2. Overview Console Clean-up

1. Browse the forms bellow and remove all record pointing to the **“ITSM4Office Overview Console”** Implementation Area.
 - SHR:Union_DataSource_FieldMappings
 - SHR:Union_DataSource_Fields
 - SHR:Union_DataSource_Forms
 - SHR:Union_DataSource_UsedBy
2. At the DB level, drop all the **“U__MSO_%”** Views

```

+ [X] dbo.U__MSO_CHG_Change
+ [X] dbo.U__MSO_HPD_Incident
+ [X] dbo.U__MSO_OverviewConsole
+ [X] dbo.U__MSO_PBM_Known_Error
+ [X] dbo.U__MSO_PBM_Problem
+ [X] dbo.U__MSO_TMS_Task
+ [X] dbo.U__MSO_WOI_WorkOrder
  
```